LESSON 4

Creating Reports

Lesson Objectives

In this lesson, you will learn how to use the reporting features in CalTOP, including how to generate reports and export data from CalTOP. In addition, you will learn how to use the Print Preview window to retrieve and view data.

A. Using the Reporting Functions

B. Using the Crystal Reports Print Preview Window

C. Exporting and Extracting Report Data from CalTOP

D. Lesson Review

A. Using the Reporting Functions

The CalTOP system includes two reporting functions. The first function enables you to generate three types of reports to track CalTOP data. The other function allows you to create text files of extracted CalTOP data to be used in other applications.

Generating Reports

You can create different types of reports through the CalTOP system:

- Web Submissions
- Batch Submissions Summary by Batch Key
- Batch Submissions Summary by Date
- Batch Submissions Detail by Batch Key
- Batch Submissions Detail by Date
- Roster of Active Clients by Client Name
- Roster of Active Clients by Client ID
- No Activity for Active Clients
- Level of Care Recommended vs. Received Summary
- Level of Care Recommended vs. Received Detail
- Service Summary for Active Clients
- Service Summary Detail for Active Clients
- Services Received vs. ASI Factors
- Episode Status Change.
- Active Clients by Period Report *(added April 2001)*

The Web Submissions Report enables you to view information about data entered and updated in, as well as data deleted from, the CalTOP system on a daily basis. The report lets you track the progress of data entry for your provider or county. For a sample report, see “Sample CalTOP Reports” on page 123.

The Batch Submissions reports enable you view summary or detailed information about ASI TOPPS II data or other batch transactions sent to the CalTOP database via e-mail. The reports also provide verification that ASI TOPPS II data was received and processed by CalTOP. For more information about sending ASI TOPPS II data to CalTOP, see “Sending ASI TOPPS II Data to the CalTOP Server” on page 109. For sample reports, see “Sample CalTOP Reports” on page 123.

The Roster of Active Clients Report enables you to print and format a daily roster with all your active clients for the current date. The roster can be used to monitor all active clients and report on their current day’s daily activities by Service Code. This roster can then be used as input for data entry back into the CalTOP system. For sample reports, see “Sample CalTOP Reports” on page 113.

The No Activity for Active Clients Report enables you to view active clients who have not had activity within a specified time. This report will allow providers to monitor whether active clients have become inactive, or whether data entry for client has not been done, even though activity has occurred. For sample reports, see “Sample CalTOP Reports” on page 113.

The Level of Care Recommended vs. Received reports enable you to view summary or detailed information on the level of recommended service from the ASAM/PPC II transaction and whether it was received for active clients for the current treatment episode. For sample reports, see “Sample CalTOP Reports” on page 113.

The Service Summary for Active Clients reports enable you to view summary or detailed information on services for active clients within a specified time period. For sample reports, see “Sample CalTOP Reports” on page 113.

The Services Received vs. ASI Factors Report enables you to view services received vs. ASI Factors for active clients. You can use this report to monitor the ASI Factors the client received in each domain versus the services (or treatments) received in that domain. For sample reports, see “Sample CalTOP Reports” on page 113.

The Episode Status Change Report enables you to view information about all Episode Status Change transactions for all clients under a given provider and within a given date range. For sample reports, see “Sample CalTOP Reports” on page 113.

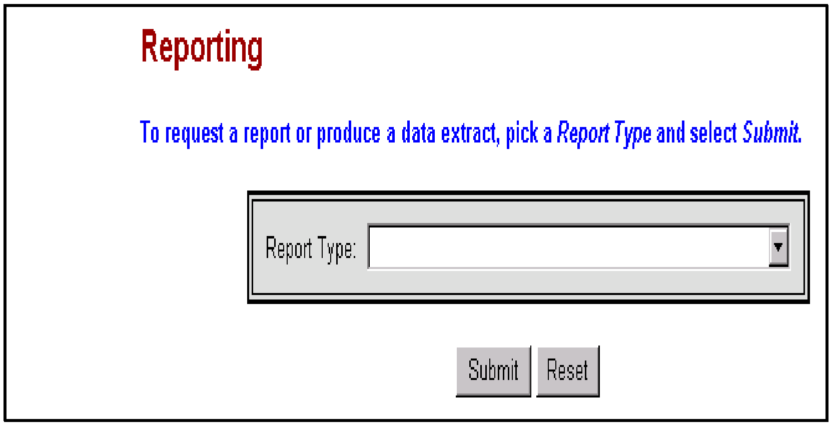
The Active Clients by Period Report shows all active clients for a specified period of time arranged alphabetically by client last name. It also shows the client ID, file number, admission date and episode status change date. The end of the report provides a summary of total active clients at the beginning of the specified period, admissions and episodes status changes during the specified period, and total active clients at the end of the specified period.

You can generate and view data entered only for counties and provider profiles you have permission to access.

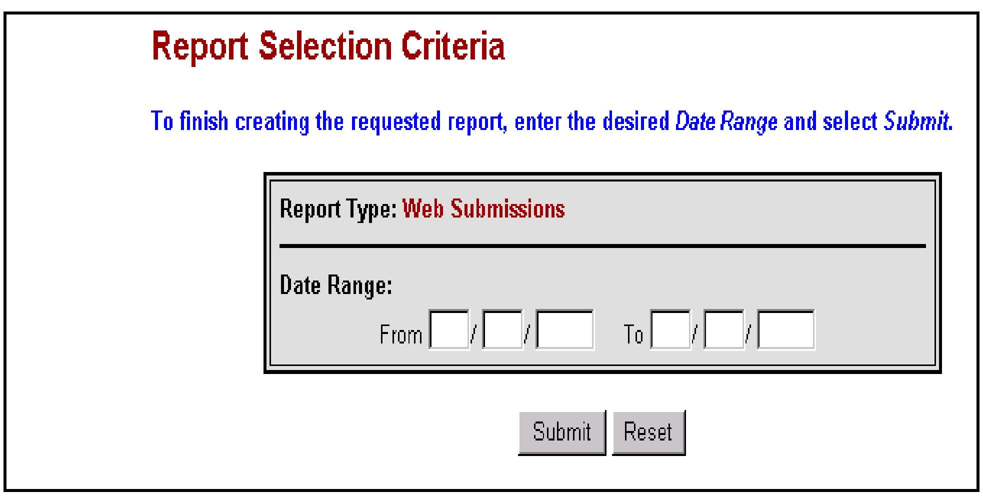
Task 1: Generating CalTOP Reports

The following steps show you how to generate CalTOP reports.

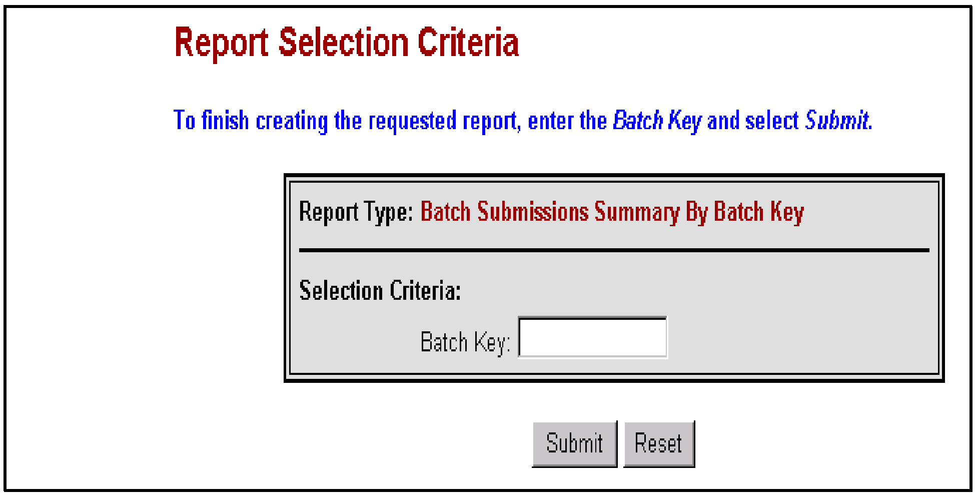
What to do	Results/Comments
1. On the CalTOP Navigation bar, click the **Reporting** link.	The Reporting page is displayed.



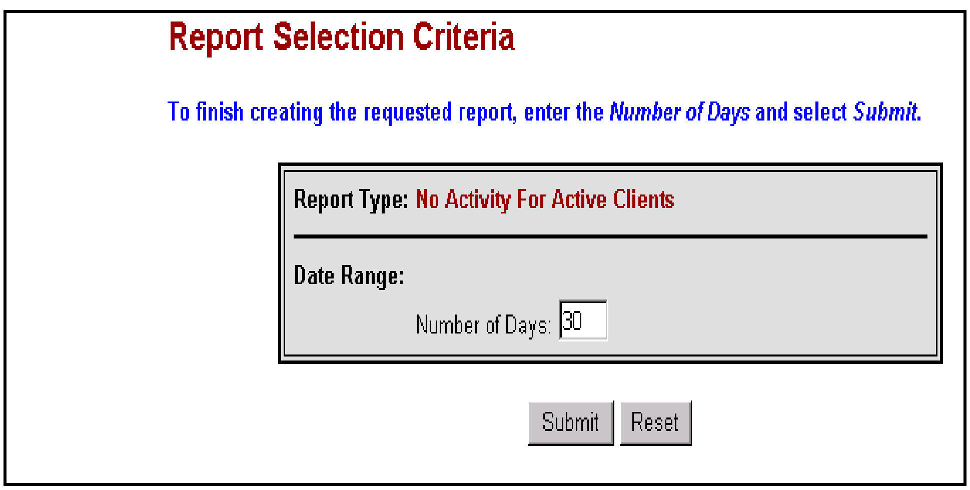
What to do	Results/Comments
2. In the **Report Type** list, select the report you want to generate and click **Submit**.	Depending on the Report Type that you select, you will either go directly to the report, or receive a secondary screen where certain parameters need to be entered.
3. For the Web Submission Report and the Batch Submission Report that are by Date, and for the Data Extract File, you will receive a screen with **Date Range** fields; type the range of dates for which you want the report to show data. Go to Step 9.	Type the dates in the following format: mm/dd/yyyy You can enter dates up to six months prior to today's date in the first **Date Range** field. You can enter dates from the first **Date Range** field to today's date in the second **Date Range** field.



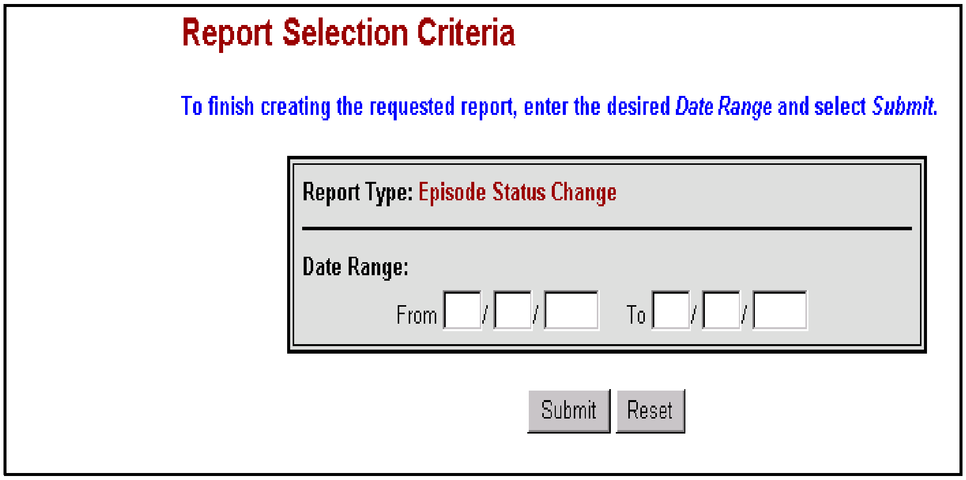
What to do	Results/Comments
4. For the Batch Submission reports that are by Batch Key, type the batch number assigned to the data you want to view. Go to Step 9.	Batch key numbers are generated and sent to you via e-mail when you submit a batch data file to the CalTOP system. For more information about sending data to CalTOP from ASI TOPPS II, see “Sending ASI TOPPS II Data to the CalTOP Server” on page 109. Batch key numbers can only be used to generate Batch Submission reports.



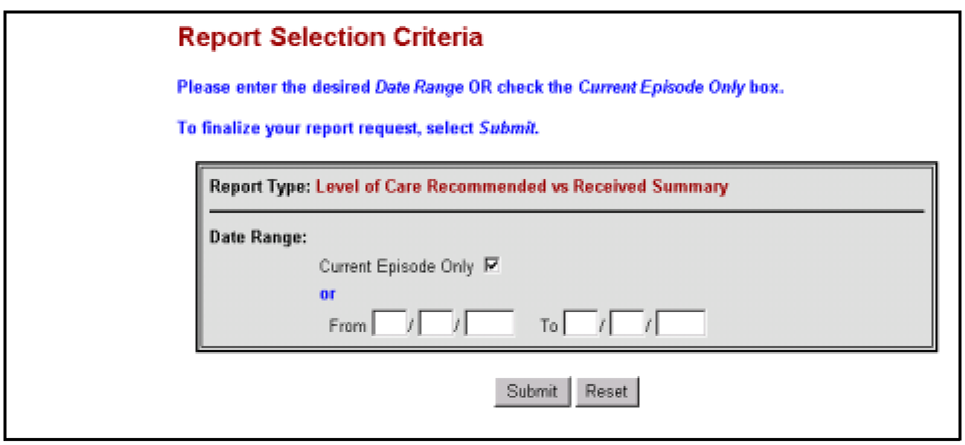
5. For the No Activity for Active Clients Report, type the number of days to be checked for no activity. Go to Step 9.	The number must be between 1 and 99. The default value is 30.



What to do	Results/Comments
6. For the Episode Status Change Report and Active Clients by Period Report you will receive a screen with **Date Range** fields; type the range of dates for which you want the report to show data. Go to Step 9.	Type the dates in the following format: mm/dd/yyyy You can enter dates from 07/01/1999 to today's date in the first **Date Range** field. You can enter dates from the first **Date Range** field to today's date in the second **Date Range** field.



What to do	Results/Comments
7. For the Level of Care Recommended vs. Received Report, you will receive a screen with **Date Range** fields; type the range of dates for which you want the report to show data. - or - Select **Current Episode Only**. Go to Step 9.	Type the dates in the following format: mm/dd/yyyy You can enter dates from 07/01/1999 to today's date in the first **Date Range** field. You can enter dates from the first **Date Range** field to today's date in the second **Date Range** field.



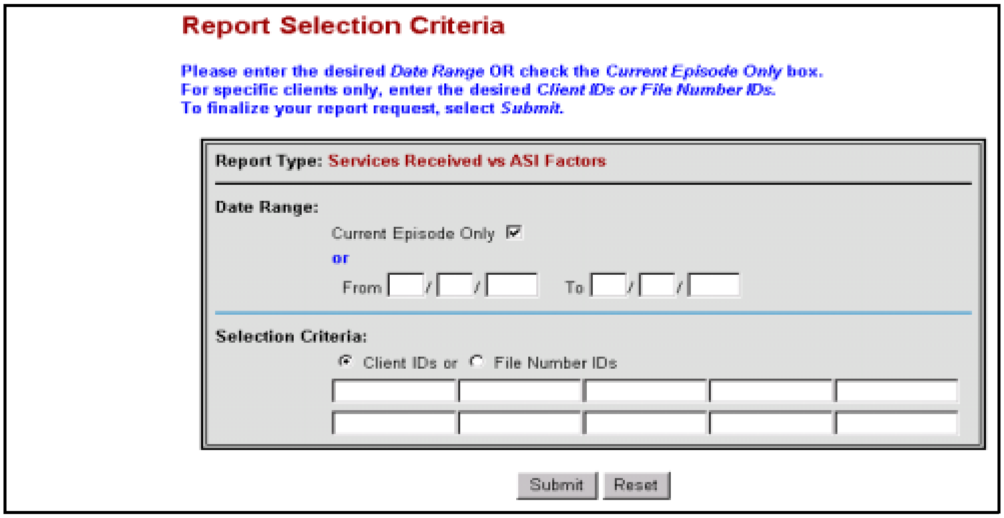
What to do

Results/Comments

8. For the Service Summary reports and the Services Received vs. ASI Factors Report, you will receive a screen with **Date Range** fields and **Selection Criteria.**

Type the dates in the following format: mm/dd/yyyy

You can enter dates from 07/01/1999 to today's date in the first **Date Range** field.



For the **Date Range** fields, type the range of dates for which you want the report to show data.

You can enter dates from the first **Date Range** field to today's date in the second **Date Range** field.

- or -

Select **Current Episode Only**.

For the **Selection Criteria** fields, type the Client IDs or File Number IDs you want the report to show.

Go to Step 9.

9. Click **Submit**.

CalTOP generates and displays the report in the Print Preview window. You can view, print, or export the data to another application.

For more information on using the Print Preview window, see "Using the Crystal Reports Print Preview Window" on page 96. For a sample report, see "Sample CalTOP Reports" on page 123.

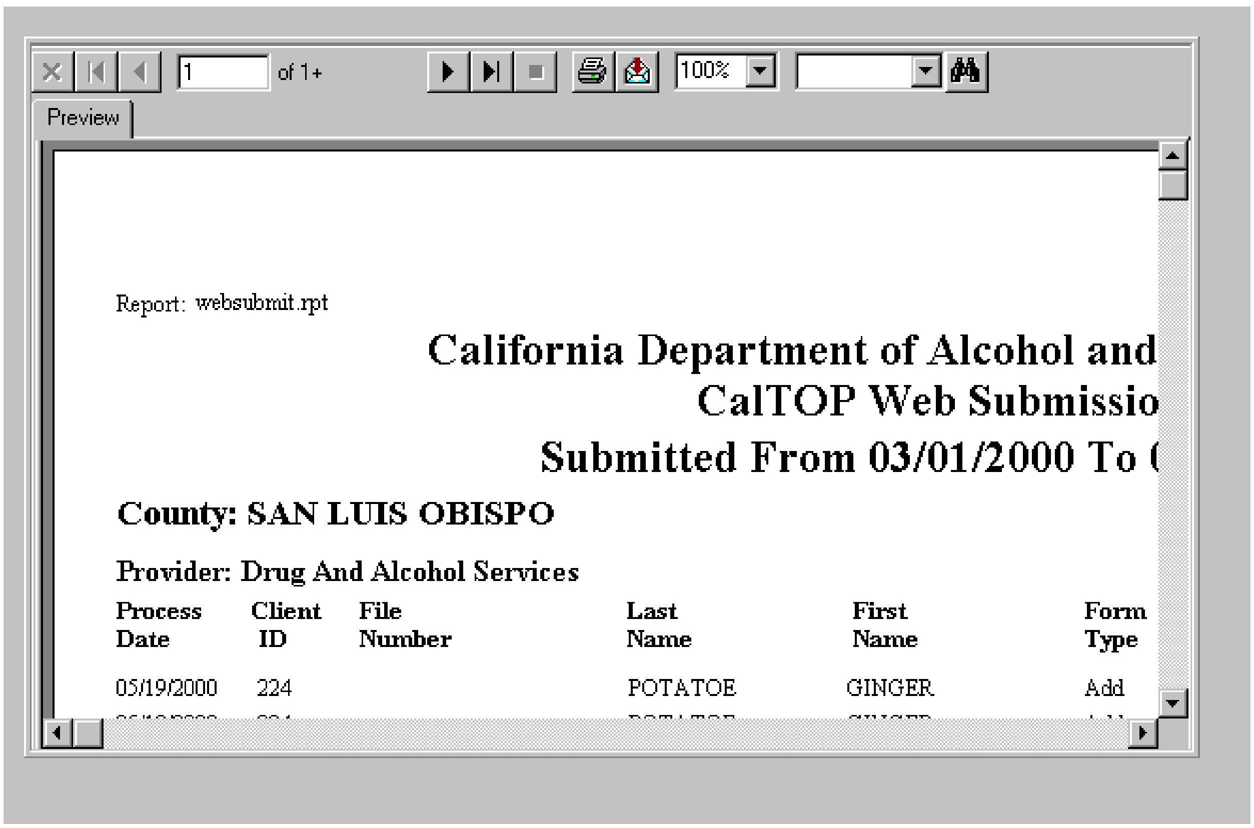
B. Using the Crystal Reports Print Preview Window

The Seagate Crystal Reports™ Print Preview window is displayed in your browser window when you generate reports in CalTOP. The window is separate from the CalTOP system, and contains its own toolbar and functions.

Navigating the Print Preview Window

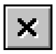
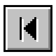
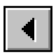
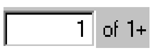
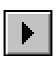
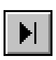
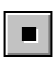
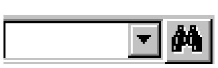
The Print Preview window contains two major elements: the Preview tab and the Print Preview toolbar. The Preview window displays the report data, and the toolbar enables you to print, navigate, and export the report data.

Print Preview Window



Using the Print Preview Toolbar

The Seagate Crystal Reports Print Preview window contains a toolbar you can use to navigate and export the report displayed in the window.

Button/Field	Function
	Closes the Print Preview window.
	Displays the first page of the report.
	Displays the previous page of the report.
	Displays the current page number. If a report has multiple pages, this field first displays “1 of 1+” instead of, for example, “1 of 5.” The 1+ means the report has multiple pages. If you page to the end of the report, this field will show the total number of pages instead of “1+.”
	Displays the next page of the report.
	Displays the last page of the report.
	Stops running the report request.
	Sends the report to the default printer.
	Exports the report to a separate file. See “Exporting and Extracting Report Data from CalTOP” on page 98 for more information.
	Sets the magnification level for viewing the report.
	Searches for specific text in the report. To use this function, type the text in the field on the left, then click the button on the right.

C. Exporting and Extracting Report Data from CalTOP

You can either export report data to other software applications through the Print Preview window, or you can extract the data as text to save in other formats using the extract file.

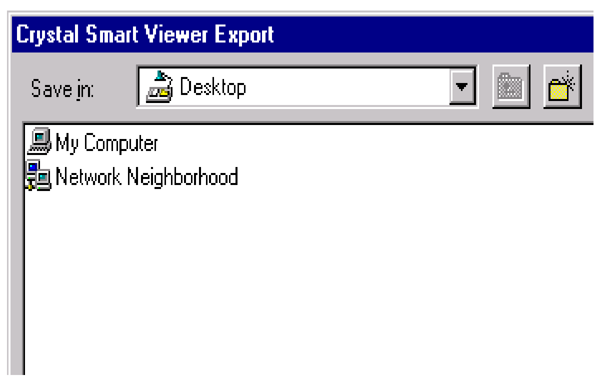
Exporting Report Data

You can use Crystal Reports’ export feature to save report data in the following formats:

- Rich text format (.rtf)
- Microsoft Word (.doc)
- Microsoft Excel 5.0 (.xls)
- Seagate Crystal Reports™ (.rpt)

! Before you export data using one of the formats listed above, make sure you have the appropriate software installed on your PC.

Task 1: Exporting Data Using Crystal Reports

What to do	Results/Comments
1. After following the steps in “Generating CalTOP Reports” on page 92, in the Crystal Reports Print Preview window, click the  button on the toolbar.	The Crystal Smart Viewer Export dialog box is displayed. 
2. In the **Save in** list, select the folder where you want to save the export file.	
3. In the **File name** field, type a name for the export file.	
4. In the **Save as type** list, select the format in which to save the export file.	

What to do	Results/Comments
5. Click **Save**.	The file is saved in the folder you specified. CalTOP displays a message asking if you want to open the file you created.
6. Click **Yes** to open the file. – or – Click **No** to return to CalTOP.	If you select **No**, you can later view or edit a previously saved file by opening the file with the proper software package.

Extracting Data Files

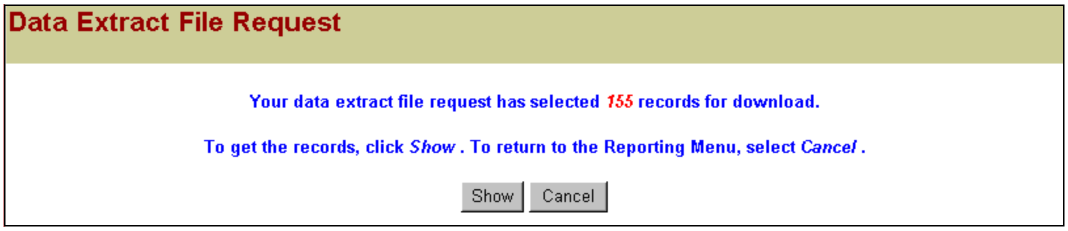
The Data Extract File function enables you to export CalTOP transaction data as text, which you can then import into other applications, such as Microsoft® Excel, to create your own reports.

! You can only extract data entered by your provider or county.

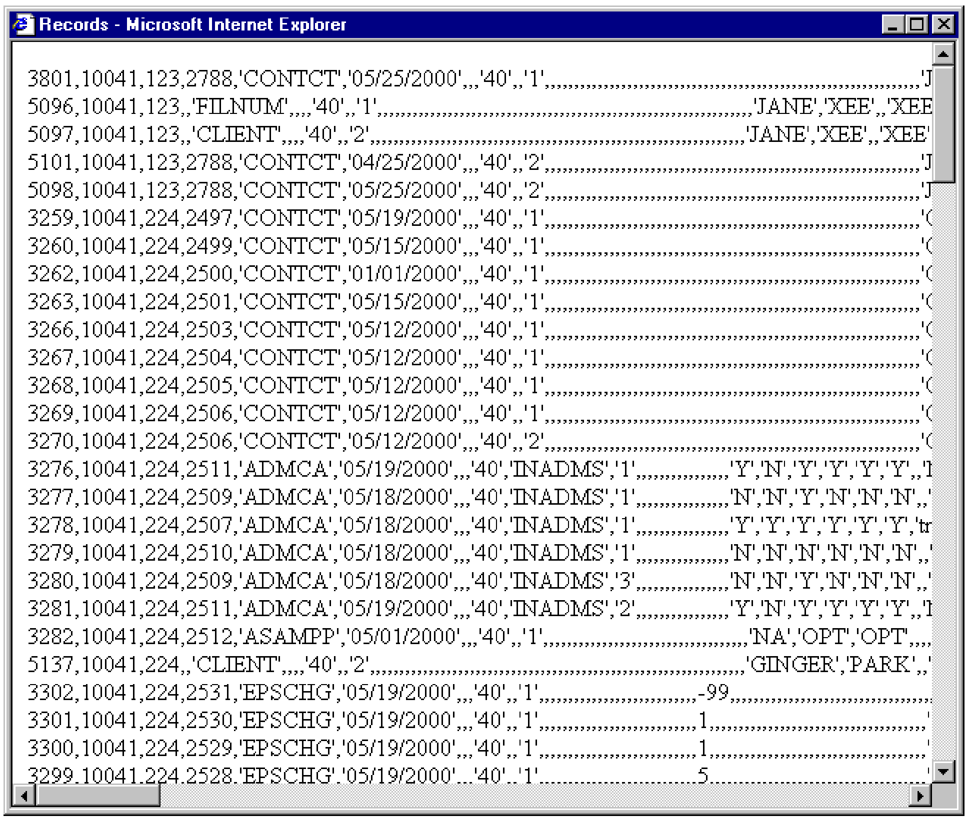
Task 2: Extracting Data from the CalTOP System

What to do	Results/Comments
1. On the CalTOP Navigation bar, click the **Reporting** link.	The Reporting page is displayed.
2. In the **Report Type** list, select **Data Extract File**.	
3. In the **Date Range** fields, type the range of dates for which you want to extract data.	Type the date in the following format: mm/dd/yyyy You can enter dates up to six months prior to today's date in the first **Date Range** field. You can enter dates after the first **Date Range** field and before or equal to today's date in the second **Date Range** field.
4. Click **Submit**.	CalTOP displays the Data Extract File Request page, and displays the message, "Your data extract file request has selected [number of records] for download."

What to do	Results/Comments



5. Click **Show**. — The Records page displays each extracted record as text.



Task 3: Saving Extracted Data as a Text File

What to do	Results/Comments

1. Select the extracted text displayed on the Records page by pressing CTRL + A.
2. Press CTRL + C to copy the data.

What to do

3. Open a new document in the application where you want to save the report data, such as Microsoft Word or Notepad.
4. On the **Edit** menu, click **Paste**.

   – or –

   Press CTRL + V.
5. Save the document in a folder designated for CalTOP extract data.
6. Close the application.
7. Close the Records page.

Results/Comments

D. Lesson Review

In this lesson, you learned how to do the following:

- Generate reports
- Extract CalTOP data files into a text file
- Use the Seagate Crystal Reports Print Preview window
- Export report data from Crystal Reports

Quiz

Test your knowledge by answering the following questions:

1. You cannot jump to the last page of a report in the Seagate Crystal Reports Print Preview window.

   True False

2. The Web Submission Report enables you to track data entered and deleted by your provider on a certain day.

   True False

3. The Batch Submission reports enable you to verify that ASI TOPPS II information sent by batch to CalTOP was successfully processed.

   True False

4. The Web Submission Report shows information about CalTOP transactions that have been added, updated, and/or deleted.

   True False

1. F 2. T 3. T 4. T